Downloaded from <https://www.velvetjobs.com/job-descriptions/client-associate>

# Example of Client Associate Job Description

Our growing company is searching for experienced candidates for the position of client associate. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client associate

* SME on process improvement issues for Account Management
* Prepare and compile new client applications
* Assist in processing wire transfers as needed
* Provide ongoing maintenance of CRM database, client distribution lists, and other client informational spreadsheets
* Prepare ad hoc reports required by clients and their consultants to be completed by stated deadline
* Manage the new account onboarding process for clients, primarily those investing in pooled vehicles
* Prepare and disseminate communications to clients
* Review and provide corrections of client invoicing
* Manage account amendments requested by Client and / or Client Director
* Prepare and assist with monthly and quarterly client reporting in a timely manner

## Qualifications for client associate

* 1+ years' administrative or client support experience
* Strong customer interaction
* Degree in Business Studies, Financial Services or other related qualification
* Desire to pursue a career in the funds industry
* Proficient with MS Office Excel and Word
* Responsible for participation in general administrative duties (copying, filing, faxing, archiving), ad-hoc projects and client events